

How Do I Use EPSQ?

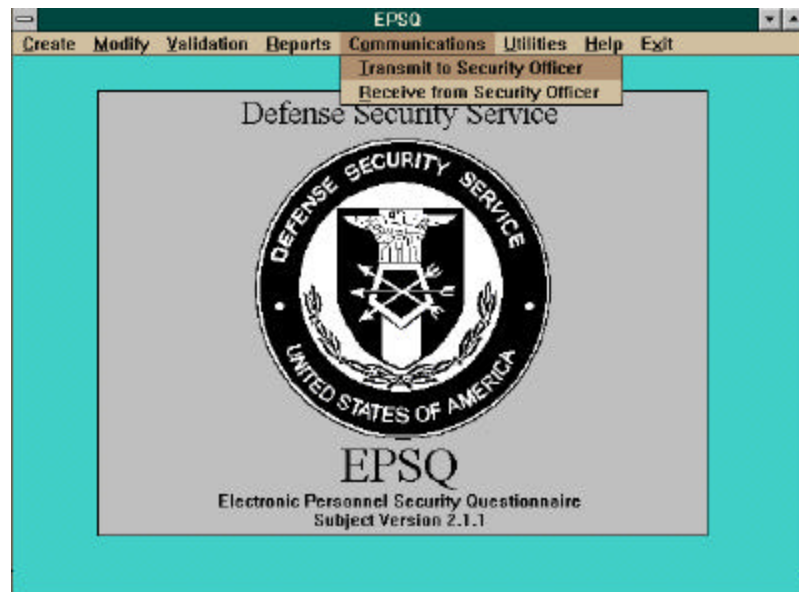
Subject Edition Instructions



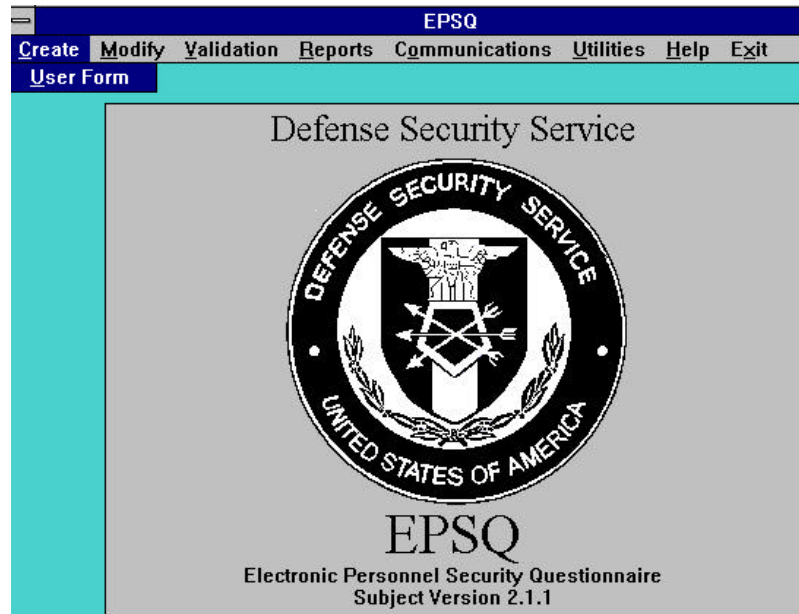
This is an overview of the EPSQ screens, and the steps required to create and transmit a form to your security officer/security manager.

Use EPSQ by Simply Going Left to Right

- In the Subject edition of EPSQ, users Create their form; Validate their form; Modify their form, if necessary; Print their form (Reports); and create a file to hand their form off to their Security Officer.

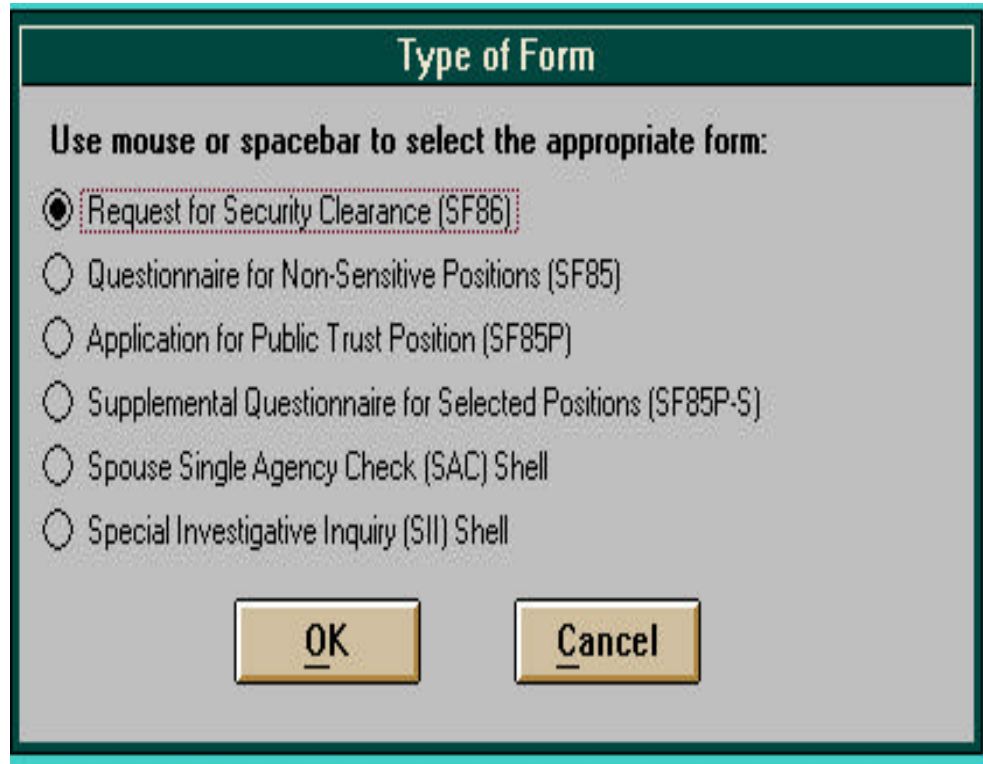


How Do I Create My User Form?



- In order to begin, go to the Create Menu.
- Select User Form.

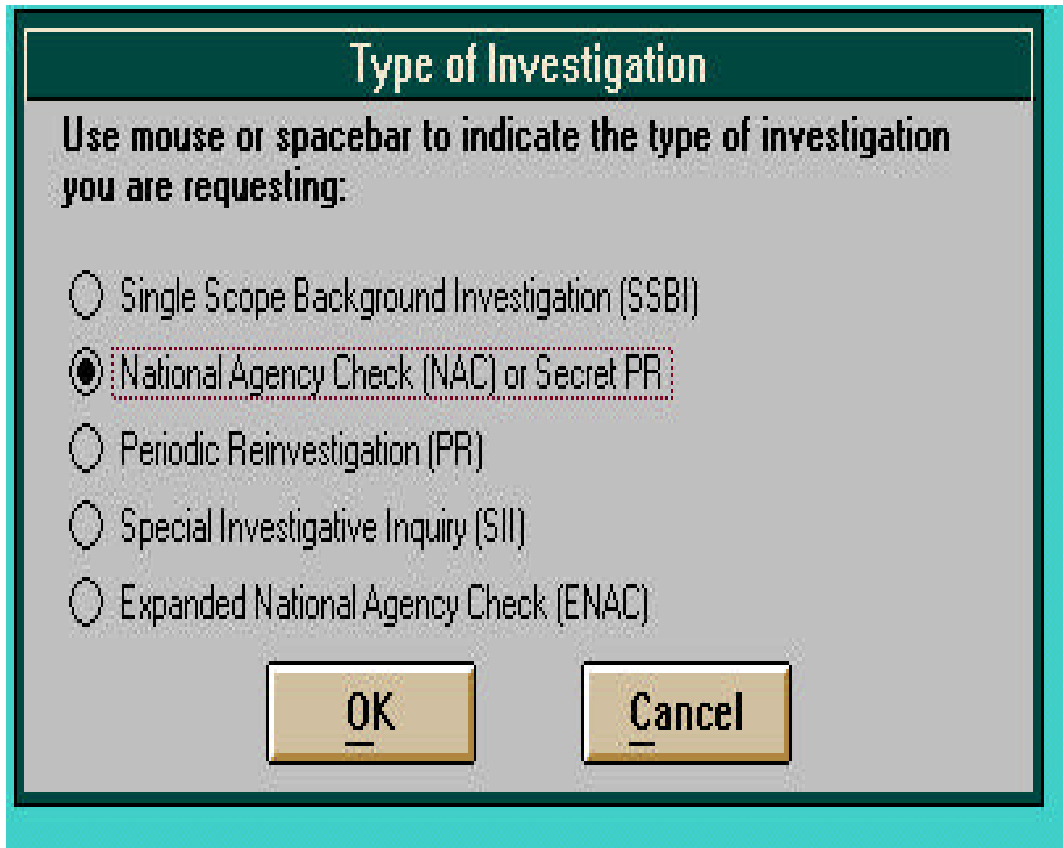
Select the Type of Form Needed



The screenshot shows a dialog box titled "Type of Form" with a dark green header. Below the header, the text "Use mouse or spacebar to select the appropriate form:" is displayed. There are six radio button options listed: "Request for Security Clearance (SF86)" (which is selected and has a red dashed border), "Questionnaire for Non-Sensitive Positions (SF85)", "Application for Public Trust Position (SF85P)", "Supplemental Questionnaire for Selected Positions (SF85P-S)", "Spouse Single Agency Check (SAC) Shell", and "Special Investigative Inquiry (SII) Shell". At the bottom of the dialog box are two buttons: "OK" and "Cancel".

- SF86 is the clearance application form.
- SF85P is for Public Trust Positions.
- SF85 is not accepted by DSS.

Selections for Type of Investigation



Type of Investigation

Use mouse or spacebar to indicate the type of investigation you are requesting:

☐ Single Scope Background Investigation (SSBI)

☒ National Agency Check (NAC) or Secret PR

☐ Periodic Reinvestigation (PR)

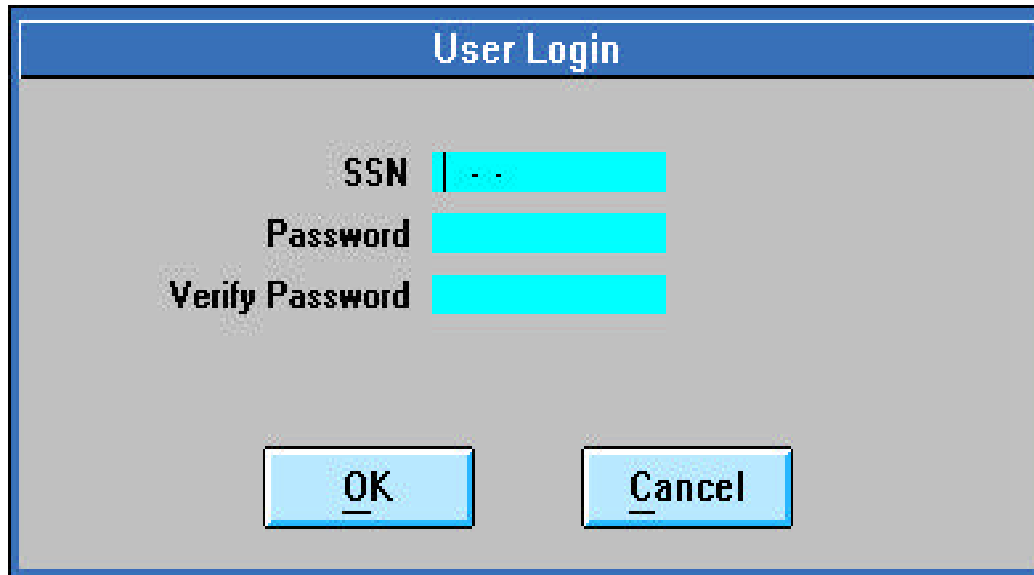
☐ Special Investigative Inquiry (SII)

☐ Expanded National Agency Check (ENAC)

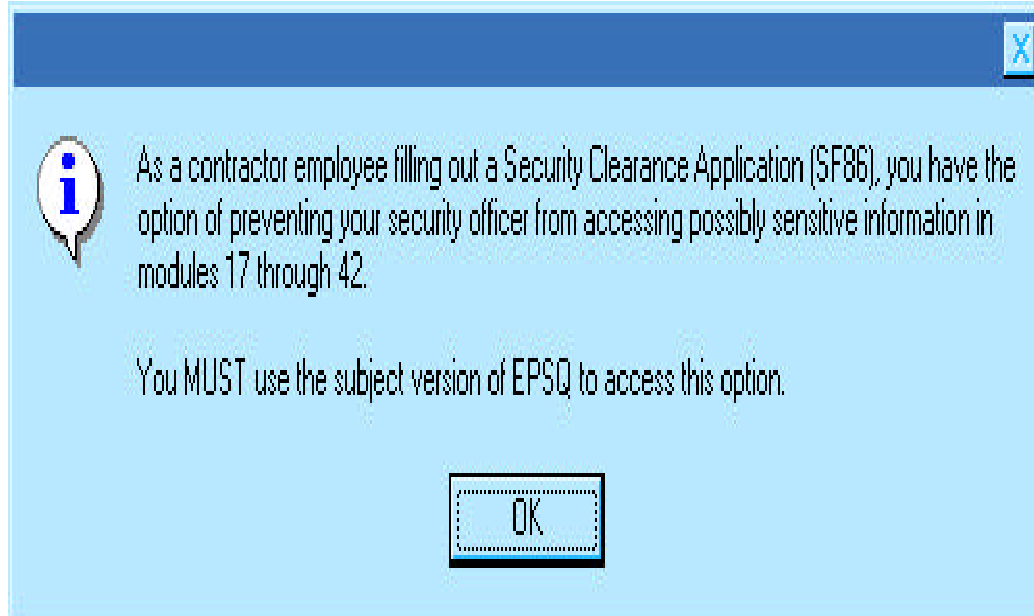
OK **Cancel**

- SSBI is typically used for a Top Secret Clearance.
- NAC/Secret PR (Periodic Reinvestigation) is for Secret Clearances.
- PR is for a Top Secret Periodic Reinvestigation.
- For a NAC/LC, select NAC.

Subject Form Password and Second Password



A dialog box titled "User Login" with a blue header bar. It contains three input fields: "SSN" with a redacted value, "Password" with a redacted value, and "Verify Password" with a redacted value. At the bottom are "OK" and "Cancel" buttons.



An information dialog box with a blue header bar and a close button (X) in the top right corner. It features an information icon (i) and the following text: "As a contractor employee filling out a Security Clearance Application (SF86), you have the option of preventing your security officer from accessing possibly sensitive information in modules 17 through 42. You MUST use the subject version of EPSQ to access this option." At the bottom is an "OK" button.

- This is the Password for the USER form.
- Enter the SSN, then create and verify the password.
- There is a 16 character maximum for the Password.
- **A CONTRACTOR** employee has the option of adding a second password to protect Modules 17 through 42 from view by his or her Security Officer.

Privacy Act Statement

Privacy Act Statement

CREATE SECURITY CLEARANCE FORM - (SF86)

Standard Form 86 Form approved: Revised September 1995
O.M.B. No. 3206-0007 U.S. Office of Personnel Management NSN 7540-00-634-4036 5
CFR Parts 731, 732, and 736 86-111

QUESTIONNAIRE FOR NATIONAL SECURITY POSITIONS

Follow instructions fully or we cannot process your form. Be sure to sign and date the certification statement on page 9 and the release on page 10. If you have any questions, call the office that gave you the form.

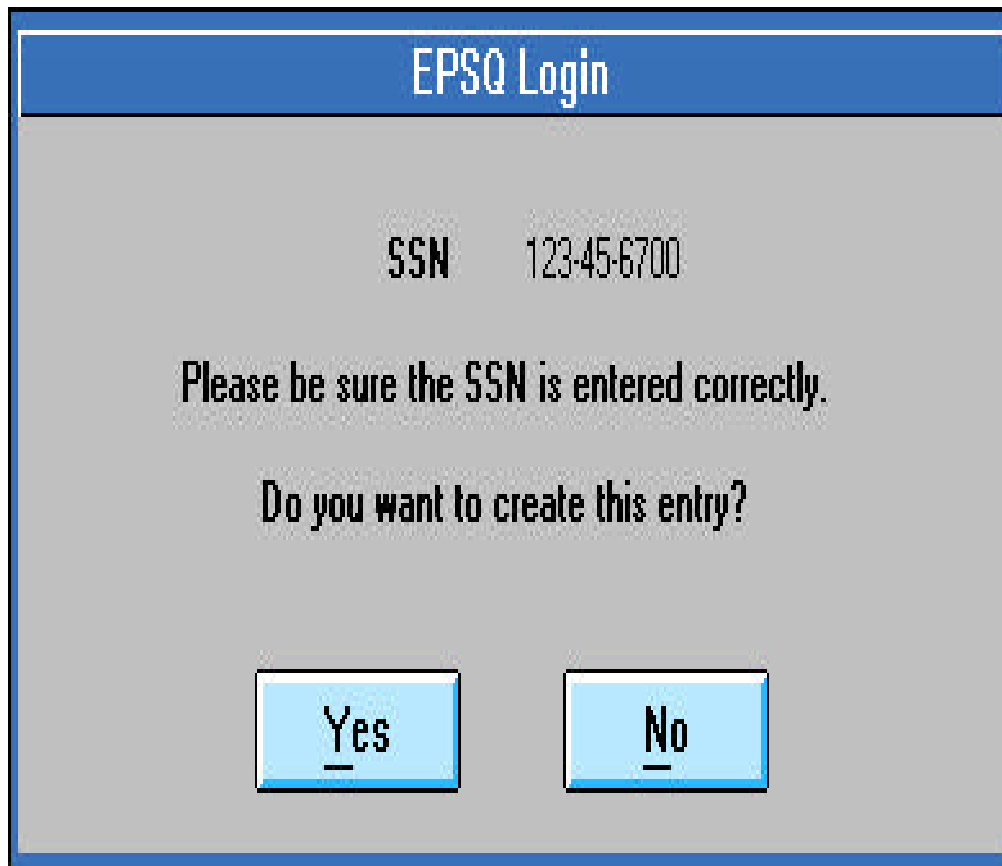
PURPOSE OF THIS FORM

The U.S. Government conducts background investigations and reinvestigations to establish that military personnel, applicants for or incumbents in national security positions, either employed by the Government or working for Government contractors, licensees, certificate holders, and grantees, are eligible for a required security clearance. Information from this form is used primarily as the basis for investigation for access to classified information or special nuclear information or material. Complete this form only after a conditional offer of employment has been made for a position requiring a security

Press <Enter> to accept and continue or <Esc> to exit

- Press
<ENTER>
after reading
the Privacy
Act Statement.

Subject's Social Security Number



The image shows a software dialog box titled "EPSQ Login". It has a blue header bar with the title in white. The main area has a light gray background. It displays "SSN 123-45-6700" in a monospaced font. Below this, it says "Please be sure the SSN is entered correctly." and "Do you want to create this entry?". At the bottom, there are two blue buttons with black text: "Yes" and "No".

EPSQ Login

SSN 123-45-6700

Please be sure the SSN is entered correctly.

Do you want to create this entry?

Yes No

- Please make sure that you have entered the SSN correctly.
- This screen asks you to double check the SSN before creating it.

Select Your Organization Type

Modify Originator Type and Address
Organization Type
139-00-0000

Select the organization type that best describes your organization

1. Military/U.S. Government
2. Contractor

1

Enter the type that best describes your organization

Next
Previous
Delete
Remarks
Help
Exit

- If you require your clearance for your military duties, or for your civilian US Government employment, enter (1).
- If you do not require a clearance (i.e., Public Trust position), enter (1).
- If you require a clearance for your employment by a defense contractor, enter (2).

Fill Out the Form

Request for Security Clearance - Module List

DOE, JANE LUCY 777-22-5555

Status	Module
	1 Personal Information
	2 Other Names Used
	3 Citizenship
	4 Where You Have Lived
	5 Where You Went To School
NV	6 Your Employment Activities
NV	7 People Who Know You Well
NV	8 Your Spouse
	9 Your Relatives and Associates
	10 Citizenship of Your Relatives and Associates
	11 Your Military History
	12 Your Foreign Activities - Property
	13 Your Foreign Activities - Employment
	14 Your Foreign Activities - Contact with Foreign Government
	15 Your Foreign Activities - Passport

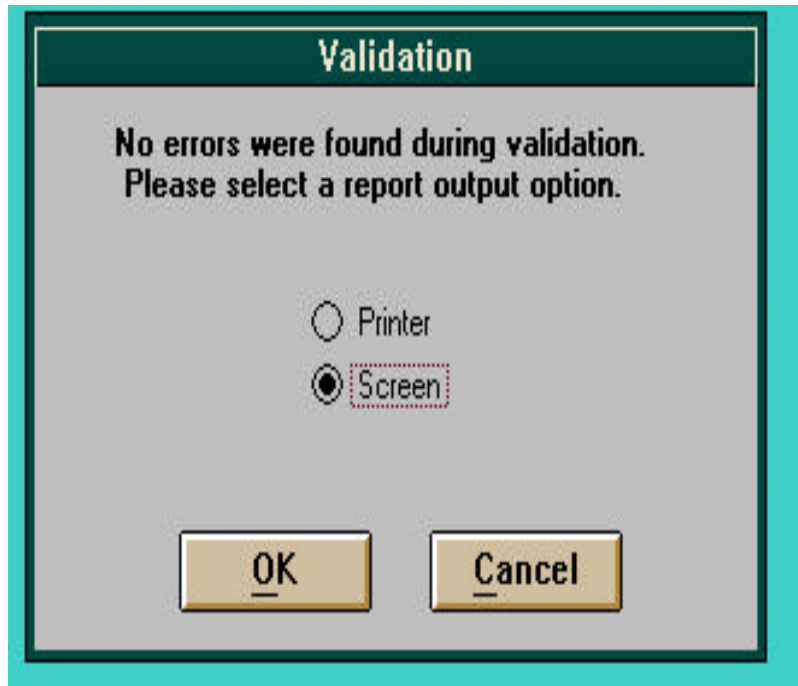
NV - Not Validated V - Validated

Ok Exit

Highlight a module and press <Enter> to select

- There are 43 modules in the EPSQ SF86.
- There are 20 modules in the EPSQ SF85P.
- You may find EPSQ an easier task if you “come to the table” prepared! Detailed “checklist” worksheets are available from a link at <http://www.dss.mil/epsq>

Validate the Form



- Once the form has been completed, **Validate the User Form.**
- You can print your **Validation report**, or view it on screen. You can save your **Validation report**, or **Exit Without Saving Report.** There is no need to save this **Report.**
- If errors are found, go in and correct them (see next slide), then **Validate** again until no errors remain.
- EPSQ's **Validation** function dramatically lowers the percentage of requests rejected by DSS for incomplete data.

How Do I Make Changes to the Form?



- Go to Modify, User Form.
- Enter your SSN.
- Select which module the error is in.
- Fix the error(s).

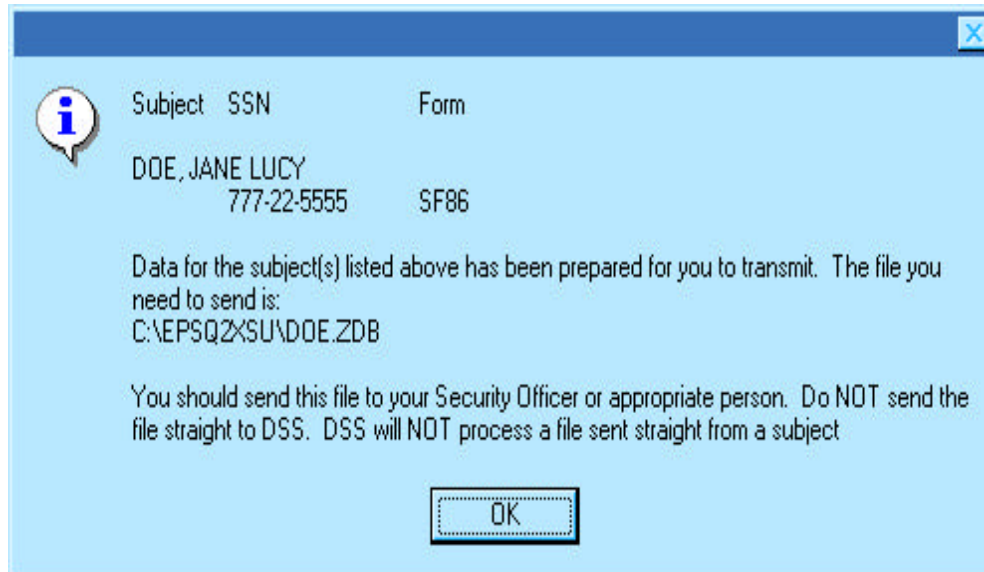
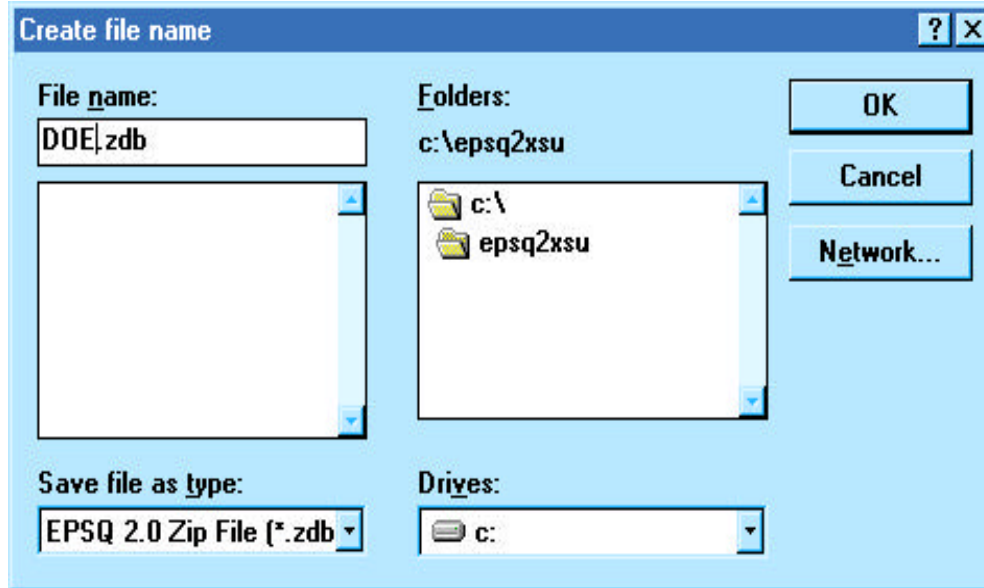
Print the User Form

The screenshot shows a window titled "Office of Personnel Management" and "SECURITY CLEARANCE APPLICATION". It displays the date "1999/08/09", "Standard Form 86, Sep. 95", "EPSQ Version 2.1", "O.M.B. No. 3206-0007", and "Time: 22:19:20". The form includes fields for "MARKS", "TOM, M", "SSN: 000-00-0010", and "Page: 1". Section 1, "Personal Information", contains fields for "Name MARKS", "TOM, M", "Birth Date 1959/11/01", "Sex Male", "Place Of Birth BALTIMORE, MD", "County NONE", "UNITED STATES", "Work/Day Phone 3933939", "Home/Evening Phone 4949449", "Height 6-01", "Weight 220", "Hair Color BLUE", and "Eye Color BLUE". Section 2, "Other Names Used", is also visible. An "OK" button is at the bottom.

Office of Personnel Management
SECURITY CLEARANCE APPLICATION
Date: 1999/08/09
Standard Form 86, Sep. 95
EPSQ Version 2.1
O.M.B. No. 3206-0007
Time: 22:19:20
MARKS
TOM, M
SSN: 000-00-0010
Page: 1
1. Personal Information
Name MARKS
TOM, M
Birth Date 1959/11/01
Sex Male
Place Of Birth BALTIMORE, MD
County NONE
UNITED STATES
Work/Day Phone 3933939
Home/Evening Phone 4949449
Height 6-01 Weight 220 Hair Color BLUE Eye Color BLUE
2. Other Names Used
OK

- Go to Reports, User Form.
- Send the report to the printer. If you print successfully, you may Exit Without Saving (printed) Report - the release forms print at the end of the form.
- If you experience printing problems, please consult FAQ #18 at www.dss.mil/epsq/epsqfaq/18.htm


Transmit to Your Security Officer



- Go to Communications, Transmit to Security Officer.
- Create your file name and delete the asterisk (see top picture).
- Select the floppy (a:) drive if you are placing the file on a diskette.
- Note where the file is being saved (see bottom picture). Press OK.
- If sending via Email: Go into your Email, address Email to your Security Officer, and attach your "Name.zdb" file - and send!

A Few Tips for New Users

The screenshot shows the EPSQ software interface. At the top left is a 'Navigation' panel with the following options: 'Next Module' (F11), 'Previous Module' (F10), 'Next Entry' (F9), 'Previous Entry' (F8), and 'New Entry' (F7). The main form area contains fields for 'First Name' (MARCUS), 'Middle' (T), 'Last' (HOOK), and 'Suffix' (empty). Below these are fields for 'Birth Date' (1959/10/20), 'City' (FORK), 'State' (MD Maryland), 'County' (HARFORD), 'Country' (UNITED STATES), and 'Sex' (M Male). To the right of the form are buttons for 'Next', 'Previous', 'Delete', 'Remarks', 'Help', and 'Exit'. At the bottom left, there is a prompt 'Enter your first name'.

- ALL Dates in EPSQ are YYYY/MM/DD - hence EPSQ is Y2K ready.
- Throughout EPSQ, middle names or initials are required. If you don't know one, please use UNK (unknown)
- If you see a pull down menu box, please use it! 
- Note the Navigation (upper left of illustration) functions available - especially helpful when listing multiple entries!

More Tips:

Navigation (what a concept!)

Navigation	
<u>N</u> ext Module	F11
<u>P</u> revious Module	F10
N <u>e</u> xt <u>E</u> nter	F9
<u>P</u> revious <u>E</u> nter	F8
N <u>e</u> w <u>E</u> nter	F7

Navigation		
Next Module	F11	
Previous Module	F10	Associates (SF86)
Next Entry	F9	
Previous Entry	F8	ETT, ANTHONY YIP
New Entry	F7	Entry 1 of 2

1. Mother	7. Stepchild	13. Half-sister
2. Father	8. Brother	14. Father-in-law
3. Stepmother	9. Sister	15. Mother-in-law
4. Stepfather	10. Stepbrother	16. Guardian
5. Foster parent	11. Stepsister	*17. Other Relative
6. Child (adopted also)	12. Half-brother	*18. Associate
19. Adult Currently Living With You		

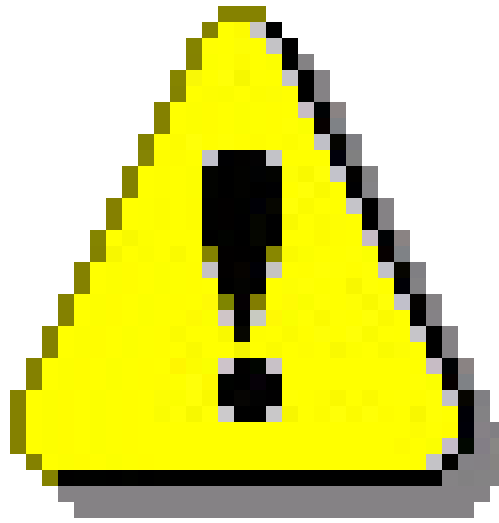
* Code 17 (Other Relative) - include only foreign national relatives not listed in 1-16 with whom you or your spouse are bound by affection, obligation, or close and continuing contact. Code 18 (Associates) - include only foreign national associates with whom you or your spouse are bound by affection, obligation, or close and continuing contact.

Relationship

Enter relationship between you and the relative/associate

- Navigation appears on the upper left of your screen throughout EPSQ.
- One mouse-click, or one click of a function key, can move you through the software faster!
- You do not have to continue clicking “next” to move through your entries.
- Particularly useful when working in Modules 4 (residences), 6 (employment activities), and 9 (relatives and associates).

- DATA ENTRY:
- When filling out employment history.....
- Military duty must be broken down by each duty station, to include Basic Training and AIT/IET.
- Each entry must have a reference to go along with it.



Entry Tips for Modules 8 and 9

Navigation

8. Your Spouse (SF86)

144-55-6645 COLUMBUS, OSCAR CRAIG

Current Spouse First Name	Middle	Last	Suffix
CARLOTTA	KOOL	COLUMBUS	

Date of Birth 1959/10/27

City SALEM

State OR Oregon

Country UNITED STATES

SSN UNK- -

Enter your current spouse's social security number

9. Your Relatives and Associates (SF86)

144-55-6645 COLUMBUS, OSCAR CRAIG **New Entry of 2**

Relationship 2 Father

Current First Name	Middle	Last	Suffix
UNK			

Birth Date / /

Country

Since you do not know the name of this family member, no other information is required for this entry. Press <OK> to move to the next screen.

OK

Enter the relative/associate's first name

Next
Previous
Delete
Remarks
Help
Exit

- If you do not know your spouse's SSN, EPSQ will accept "UNK" in that field.
- If you do not know the name, nor any other data, of a required relative (Mother, Father), enter "UNK" in the first field and nothing further is required.

Tips for Avoiding the Pitfalls of Module 10

Navigation

10. Citizenship of Your Relatives and Associates (SF86)

144-55-6645 COLUMBUS, OSCAR CRAIG

If you currently have a SPOUSE-LIKE relationship with someone who is a U.S. citizen NOT by birth, or who is an alien residing in the U.S., highlight and select: 'Individual with whom you have a spouse-like relationship' and enter data. IF ANY OTHER NAMES ARE LISTED, select and enter data. OTHERWISE, PRESS [Next] FOR THE NEXT MODULE.

NAME	RELATIONSHIP	CITIZENSHIP
Spouse-like relationship individual		

Select

Select an entry

Next
Previous
Delete
Remarks
Help
Exit

Navigation

10. Citizenship of Your Relatives and Associates (SF86)

Citizenship Status Document - Spouse-Like Associate

144-55-6645 COLUMBUS, OSCAR CRAIG

Relationship 15 Current spouse-like relationship

First Name Middle Last Suffix

LEE TERRY BROWN

Birth Date 1929/12/30

Proof of Citizenship Document

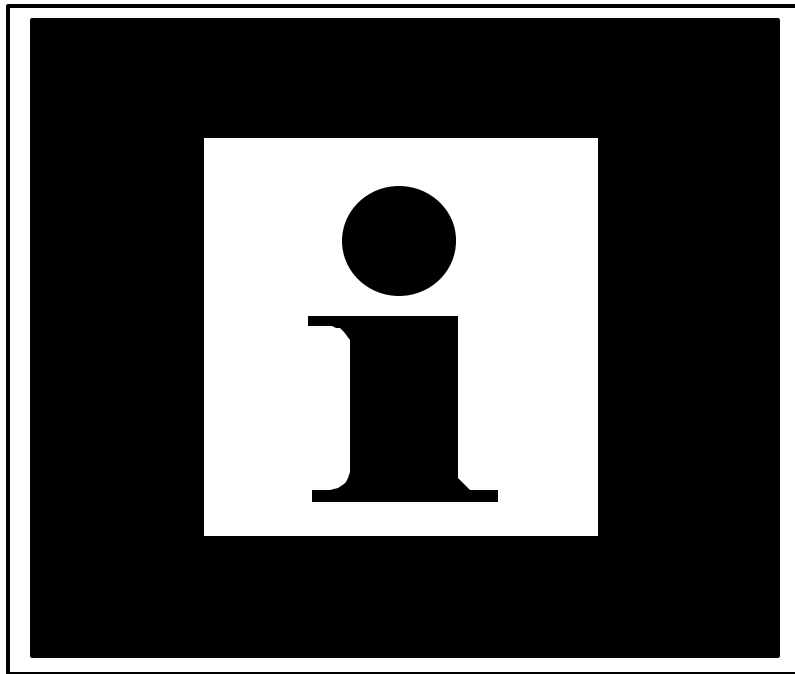
1 Naturalization Certificate

Next
Previous
Delete
Remarks
Help
Exit

To delete this entry, press [Enter]

- Do not click on “Spouse-like relationship individual” unless you currently have a “spouse-like” relationship with someone (other than your Spouse!) who is a U.S. citizen NOT by birth, or who is an immigrant alien residing in the U.S.
- If you unintentionally have an entry in the second screen of Module 10 (see left) you can get rid of the entry by clicking Delete. Please see FAQ # 49 for more troubleshooting in this area.

What Should I Do if I Need Help With EPSQ?



- Much information regarding EPSQ is available from our Web page - www.dss.mil/epsq. This page includes a link to over 50 EPSQ Frequently Asked Questions, links to detailed “checklist” worksheets, and links to our Instruction Guides that are available for download.
- Our Customer Support Center can be reached via e-mail at: epsq_questions@mail.dss.mil, or by telephone at 1-800-542-0237 (Option 1).

Where Do I Send the Fingerprint Cards and Release Forms?



U.S. Mail:

Defense Security Service
Personnel Investigations
Center

P.O. Box 18585

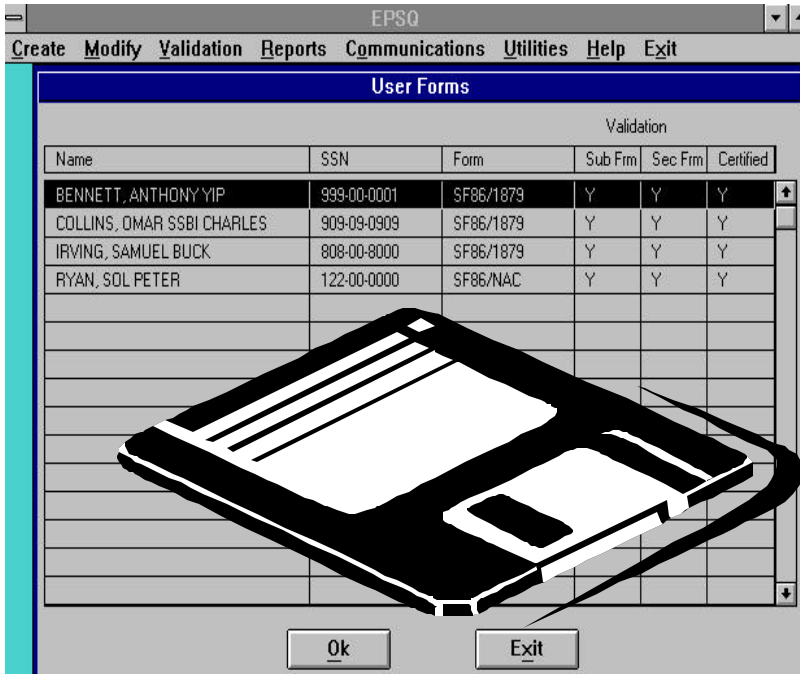
Baltimore, MD 21240-8585

• **Overnight Delivery
Service:**

Defense Security Service
881 Elkridge Landing Road
Linthicum, MD 21090

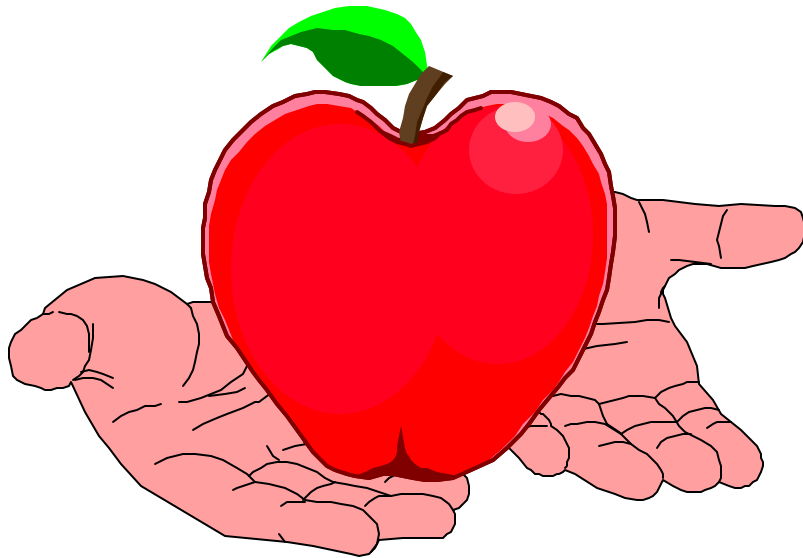
Should I Consider Saving the Files That I Created in EPSQ to a Disk?

- At a certain point, Security Officer users may wish to remove completed, transmitted EPSQ files from their program. Storing too many files within EPSQ may affect the software's performance; it will certainly cause the file that you wish to locate to be more difficult to find.
- We suggest looking under Utilities in EPSQ, and unloading the files to .cds (Common Data Structure) format. You may then store these files in another media (e.g., on a diskette).
- Up to 700 EPSQ .cds files can safely be stored on a single diskette.



Is There a Mac Compatible

EPSQ? DSS decided not to release a Macintosh version of EPSQ due to resource limitations. We had to make this decision based on the fact that most of our users are working in a Windows environment.



- We are aware that this may have inconvenienced some potential users.
- In the future, DSS plans to develop a Web-enabled version of EPSQ that would be essentially platform independent. There is, however, no schedule or date for this Web version at present.

Note That EPSQ Requires Entry of Middle Names

Middle names are important!

Could you identify these
folks without them?

- John ____ Mellancamp
- John ____ Booth
- Kathie ____ Gifford
- Billie ____ King
- William ____ Schaefer
- Frank ____ Wright
- Lee ____ Rhimes
- Stevie ____ Vaughn
- Sally ____ Raphael
- Tommy ____ Jones

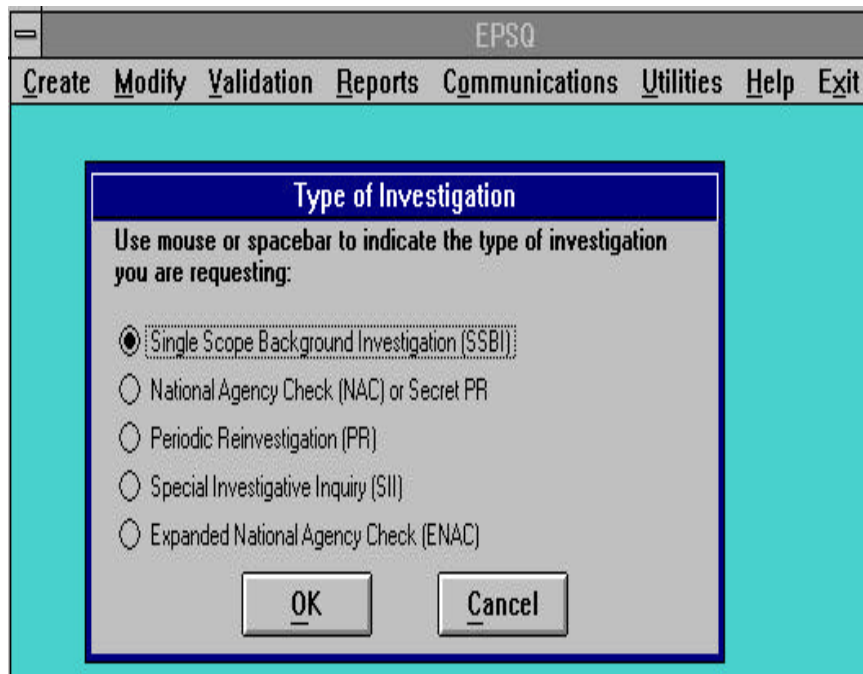
It is **crucial** to enter your middle name, and the middle name of all references. If the person does not have a middle name, enter NMN. If you do not know the middle name, enter UNK. If the middle name consists of an initial only, enter the initial.

What if the Form I Need Isn't on the List to Transmit?



- Revalidate the User form AND the Security Information.
- Go to Reports, and Print the User Form AND the Security Information to the SCREEN.
- Re-certify the form.
- Attempt transmitting again.

Entered the Wrong Type of Investigation onto EPSQ?



- If the wrong investigation type was selected when the form was created, change the Type of Investigation (SSBI, NAC, PR, etc.) by following these steps:
 - 1) Log into Security Officer edition.
 - 2) Go to Create.
 - 3) Select form type (i.e., SF86).
 - 4) Select Type of Investigation required.
 - 5) Type in the SSN, and the same password as already used.
- System should ask if you wish to change the investigation type - Select Yes.